



## Itawamba Community College Employee Performance Evaluation Form

Employee Name: Tatiana Sherman Employee Job Title: WF Project Manager  
 Department: Workforce Division: Economic and Com. Service  
 Reviewing Supervisor: Joe Lowder Review Period: July 2017- January 2019  
 Job Title: Dean of Economic and Community Services

### RATING CATEGORIES:

- 4 -Exceeds Expectations (performance that consistently goes beyond meeting goals)
- 3 -Fully Meets Expectations (commendable performance that meets goals)
- 2 - Partially Meets Expectations (inconsistent aspects of performance requiring improvement to meet some goals)
- 1 -Does Not Meet Expectations (goals unmet, skills not demonstrated, improvement needed)

### PART ONE: REVIEW OF PERFORMANCE ELEMENTS

#### WORK QUALITY

Work products are professional, clear and comprehensive in keeping with department standards.

SELECT RATING - 1

#### PRODUCTIVITY:

Produces targeted outcomes and results efficiently and effectively.

SELECT RATING - 2

#### CUSTOMER FOCUS (Students and Companies):

Establishes and maintains good working relationships with customers, by understanding and responding promptly to customer needs and expectations.

SELECT RATING - 2

#### FUNCTIONAL/TECHNICAL KNOWLEDGE:

Demonstrates expertise in the functional aspects of the job and follows guidelines and procedures.

SELECT RATING - 2

Proficient knowledge of state, federal policy and procedures pertinent for department.

SELECT RATING - 3

Understand workforce terminology and trends or seeks others advice and/or training to keep up to date.

SELECT RATING - 3

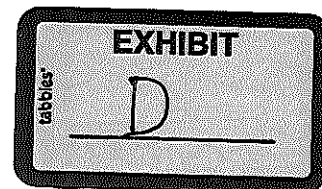
#### COMMUNICATION (Written, Oral and Presentation):

Uses clear and appropriate language in writing and verbally in an appropriate manner in a variety of situations.

SELECT RATING - 1

Responds via phone/email to customers, students and co-workers in a timely and professional manner.

SELECT RATING - 1



ICC Sherman  
2-000060

Produces and delivers quality formal presentations to a variety of audiences, where applicable.

**SELECT RATING - 3**

**TEAMWORK/INTERPERSONAL RELATIONS/FLEXIBILITY:**

Works collaboratively with fellow employees and colleagues to achieve identified goals and objectives for the department and college, including extra-curricular activities of the college such as graduation, benefit events (bluegrass), consortium events, etc.

**SELECT RATING - 1**

Builds productive rapport with employees at all levels within and outside the department. Treats others with respect, dignity, and fosters the value of diversity and inclusion.

**SELECT RATING - 1**

Adjusts performance to accommodate changes in departmental direction and processes.

**SELECT RATING - 1**

Active participation in assigned departmental meetings and committees, as well as college and division wide meetings and events.

**SELECT RATING - 2**

**INNOVATION:**

Explores and suggests new approaches and methods to achieve departmental goals and responsibilities.

**SELECT RATING - 3**

**PROBLEM SOLVING:**

Analyzes facts and data, using sound judgment, to arrive at effective solutions.

**SELECT RATING - 1**

**DEPENDABILITY/SELF-MANAGEMENT:**

Consistently adheres to work schedule, set priorities and completes assignments in a timely fashion.

**SELECT RATING - 1**

Demonstrates initiative to solve problems when unsure, and seek others advice to move toward a solution.

**SELECT RATING - 1**

**TRAINING REQUIREMENTS:**

Seeks out professional development opportunities and meets ICC professional development hours.

**SELECT RATING - 3**

Seeks out opportunities to represent and promote the college at local, regional and national conferences and events, where applicable.

**SELECT RATING - 3**

**FINANCIAL/RESOURCE MANAGEMENT:**

Manages financial performance in area of responsibility in accordance with budget and department goals.

**SELECT RATING - 2**

Maintains accurate and detailed class records, certifications and budgets that will meet full audit compliance including: grants, state, and federal funds.

**SELECT RATING - 1**

**PART TWO: SUMMARY REVIEW OF EMPLOYEE PERFORMANCE**

Supervisor describes employee's major assignments and accomplishments, key strengths, any performance shortfalls, and other performance elements that characterize the employee's performance during the review period. Please include supporting information below.

Ms. Sherman has introduced some innovative programs to the division this past year including the 64 hr NCCER construction class and the ESB certification for Entrepreneurship. Ms. Sherman also agreed recently to coordinate the Manufacturing Extension Partnership, a federal grant matching program for the department. We will need to review this workload moving forward.

The project management portion of the job is the focus of the position. The amount of companies serviced by the workforce department requires much attention. The team and I have experienced issues with communication, teamwork, tracking and proper documentation from Ms. Sherman over the past year and beyond. I will provide a detailed performance expectations plan to address these issues attached with this performance evaluation. The overall goal will be to outline strategies to move from a reactive to a proactive approach to project management, improve communication and teamwork within the department.

**PART THREE: OVERALL PERFORMANCE RATING**

EXCEEDS  
EXPECTATIONS

☐

FULLY MEETS  
EXPECTATIONS

☐

PARTIALLY MEETS  
EXPECTATIONS

☐

DOES NOT MEET  
EXPECTATIONS

☒
**PART FOUR: PERFORMANCE GOALS FOR NEXT REVIEW PERIOD**

Supervisor identifies goals for the upcoming review period to ensure continued contributions from the employee for success within the organization. Consider the employee's performance improvement needs and action plan, training recommendations, future goals and expectations.

**1. Quotes-** quotes should be reviewed by director and given to director in timely manner for proper review. Quotes in past have been sent to company before approved by director, not shared in a timely manner, and not detailed. Even recently a quote was given with an email stating that you can fill in the class details.

**2. Tracking/Documentation** – Ms. Sherman is not usually able to pull up past information and build from that info to help us make an informed decision on current pricing and classes. This has been hard to get when needed, usually someone else has to look in pro-assessment database which does not go that far back to get the info we need.

**2b. Tracking of surveys/documents for class completion should be kept and shared.** If surveys, work agreements, or any important company or project documents are passed onto someone else in the department, the project manager should keep a copy for project manager files. This is extremely important for certifications, and each person who attends a pathway should be encouraged to attain a certification. Certifications and job placements should be checked and tracked and documented for performance completion. This has not been the case for all participants in all pathways. Certifications and job placements have not all been tracked. Also, final surveys could not be found for Entrepreneurship program, Ms. Sherman stated she gave these to accountability staff and they can now not be found.

**2c. Project timeline tracking/checks** – One of the most important aspects of company projects is the reimbursement check. Currently Ms. Sherman usually sends an email that states company is asking about check. This usually sets off a reactive approach from the team to try and get a check to the company. It would be preferable to be pro-active in managing the timeline of check reimbursement and will outline a timeline and steps to manage these expectations.

**3. Communication** – Ms. Sherman seems to prefer communication via email, this is needed to clarify and follow up, but every interaction does not need to begin this way. As stated above in regard to company checks and reimbursements, usually an email is sent to check in that creates a reactive approach from the team that usually does not include Ms. Sherman in person.

**3a. Programmatic communication** – Another recent example is the entrepreneurship program. I received a detailed email about major changes and plans to expand the program, but we never had a conversation prior to the email about these plans. After the email, I had many questions and within a week of my questions Ms. Sherman wanted to answer a bank about a sponsorship of this new entrepreneurship program, but there were too many unknowns that could be a liability to the institution including trademarks and SACS accreditation. Many steps were taken without discussion or direction.

**3b. Process Communication** – Another example of delayed communication is when I received an important quote to review in the late afternoon before thanksgiving break. Proper amount of time was not given to review and this has occurred multiple times where an unrealistic turnaround time is requested from Ms. Sherman. Proper expectations were not given to company or was not passed on to me in a timely manner.

**3c. Company feedback** – Lastly, I have had remarks from companies about Ms. Sherman's communication not being clear or in a timely manner.

**4. Teamwork** – Ms. Sherman excels when working on a task alone, but seems to struggle with a collaborative approach. This includes a lack of communication and also a lack of being personally and physically involved in processes.

**4a. Meeting example** – I had to strongly encourage her to attend the pathway committee meetings that she appointed to attend. She missed a few at the beginning and stated she had appointments, but regular scheduled meetings should be planned around in advanced. (this may not always be possible). She has improved in this area. However, during attendance of these committee meetings, participation and involvement is important. Reports from committee members indicate Ms. Sherman does not always fully participate when in attendance and they do not know much about construction or entrepreneurship pathways.

**4b. Collaborative example** – Ms. Sherman refused to participate in the bluegrass concert fundraising this past year. She had done a tremendous service to the college many years in the past but refused to help this last year. I strongly encouraged her to help at least this year with a new president coming on board and we could have further discussions after working together this year to show success for our workforce team. She refused multiple times and sent an email to Dr. Bunch also stating the same thing. I tried to keep the matter internal to our team but the situation was final after the email to Dr. Bunch was sent and she did not participate, so other members of the workforce team filled in and contacted her companies.

**4c. Process/paperwork example** – Most recently, in December the team was trying to get paperwork completed for one of Ms. Sherman's companies. It was a team effort, everyone was working hard before leaving for Christmas to get the company a reimbursement. The paperwork for the reimbursement process was in the second or third round of people checking and correcting the large stack of paperwork. We had a scheduled visit with a company with Dr. Allen that day. I strongly encouraged Ms. Sherman to stay and help the team with the paperwork, but she persisted that she wanted to come to the company visit. When we returned, I had to leave, and I asked her to go up and help the team finish the paperwork. By the end of the day the team had the reimbursement finished and ready. The next day Ms. Sherman reviewed the paperwork and found an error and the team had to rework the reimbursement. The team asked me why she didn't help while they were working on it the afternoon before. I don't know the reason but if she was participating like I asked when we returned, they could have potentially caught the error as they were working and saved everyone time.

**5. Feedback/Trust** – Ms. Sherman seems to have a difficult time with feedback to improve her performance. If during a process (paperwork, meetings, etc) I try to provide feedback or alternative viewpoints they are rarely welcomed. Typically, she places blame elsewhere in the process or she deflects from the issue.

Recently Ms. Sherman asked to attend a conference and I said no because none of us were going. A few of us were attending a state directors meeting and coming back. She told me I was lying because she went into the Project application Ms. Waters wrote and saw a request for conference fee reimbursement. I let her know I was not lying and that Ms. Waters had copied last year's project request and that needed to be corrected. It shows a high-level of distrust to log into another employees project to verify what I told her. This shows a lack of trust and is unprofessional.

Lastly, during the process of receiving and finalizing a recent grant received for one of our companies through MDA, myself, Ms. Waters and Mr. Gates were all on the same page via email on how to use and spend this money. Ms. Sherman disagreed and thought we needed to use state WET funds before expending MDA funds. I was out of the office, but she had a difficult time accepting this according to Ms. Waters. So when I got back we called a meeting with Mr. Gates, Ms. Cathy Bishop, Ms. Waters and Ms. Sherman to get us all on the same page. That meeting was not necessary but was scheduled to discuss once again on how to spend the money and get everyone on board.

Even before this meeting, Ms. Sherman called the financial partner who serves as fiscal agent to the MDA grant to verify because she did not trust what the workforce director had instructed, even though the director and dean had met with the external financial partner, she needed their personal verification. It does not look good for the college to have staff calling to verify with an outside financial partner what we already knew and were told by that partner. These type of situations have led to lack of trust and loss of time. We spend a lot of time internally on these issues which keeps us from moving forward in a timely manner.

Overall, my hope in highlighting these issues is to help the department move from a reactive to a more proactive approach. I believe Ms. Sherman wants what is best for ICC and the department. Due to poor performance a performance improvement plan is required and will be shared.

#### REQUIRED SIGNATURES

REVIEWING SUPERVISOR: Joe Lowder

DATE 3/8/19

NAME/TITLE: Dean of Economic and Community Services

I have received and reviewed this evaluation of my performance. My signature below indicates neither agreement nor disagreement with this evaluation.

EMPLOYEE: JC Sherman

DATE March 8, 2019

W: T. Smith 3/8/2019